

**WARNING:** It may be necessary to reschedule these courses. Final details are being arranged.

Important Note: all these courses are "pre-configuration" training, intended for staff who will be installing and customizing Peoplesoft. This is NOT END USER TRAINING. These courses will cover generic Peoplesoft software, it will not be the software we will customize for Wisconsin. End user training comes later.

Other notes:

- Students should obtain permission to attend these training sessions, using the employing agency's usual policies and procedures.
- Recording of attendance of this training should be the same as for any other training.
- Courses with the same name are intended to be identical, even though the provider may differ.
- You must take the "Introduction" before you can take "General Ledger".
- A brief description of each course appears later in this document.

Classes Provided by Inacom	Classes Provided by Oracle/Peoplesoft
<p>10/05 - <b>Introduction to PeopleSoft</b> for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)</p> <p>10/06 - <b>Introduction to PeopleSoft</b> for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)</p> <p>10/17-10/20 - <b>General Ledger</b> (4 days)</p>	<p>09/28 - <b>Introduction to PeopleSoft</b> for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)</p> <p>09/29 - <b>Introduction to PeopleSoft</b> for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)</p> <p>10/10 - 10/13 - <b>General Ledger</b> (4 days)</p>
<p>Location: Inacom 3001 W. Beltline Hwy, Madison, WI</p>	<p>Location:</p> <ul style="list-style-type: none"> <li>• Introduction: Greenbrier and Russel 8383 Greenway Boulevard, Suite 200, Middleton, WI</li> <li>• General Ledger location to be determined (in Madison)</li> </ul>
<p>Cost: Introduction: \$275 GenLedger: \$1100</p>	<p>Cost (note that these costs are for the first wave only): Introduction: \$275 GenLedger: \$1908 (note: final cost still being determined)</p>
<p>Who Pays? The employing agency of the student pays all costs, including the course fee and any mileage or other associated costs, unless it has been agreed by all parties that the student will serve as a "Business Analyst" for the IBIS Project (meaning the person will be working 80% on the project). For Business Analysts, the IBIS Project pays the cost.</p>	<p>(Same as for Inacom training - in left column)</p>
<p>Intended Audience (in order of priority)</p> <ul style="list-style-type: none"> <li>• IBIS Team Members (12 people)</li> <li>• IBIS Project "Business Analysts" who work on IBIS 80% time</li> <li>• Subject Matter Experts who have been involved with the IBIS Project teams</li> <li>• Developers (computer programmers) who will support IBIS during and after implementation</li> <li>• Tech Support staff, database analysts, and other technicians who will be working with IBIS</li> <li>• Business staff (end users) in agencies</li> <li>• Others who may be interested</li> </ul>	<p>(Same as for Inacom training - in left column)</p>

<p>How to request to attend:</p> <ol style="list-style-type: none"> <li>1. Send an e-mail to <a href="mailto:DOAIBIS@wisconsin.gov">DOAIBIS@wisconsin.gov</a> - include names of all students, agency, class name and class date</li> <li>2. You will receive an e-mail, acknowledging receipt of your request.</li> <li>3. Await a second e-mail that provides more information.</li> <li>4. After receiving the second e-mail, follow the procedures on the next page.</li> </ol>	<p>How to request to attend:</p> <ol style="list-style-type: none"> <li>1. Send an e-mail to <a href="mailto:DOAIBIS@wisconsin.gov">DOAIBIS@wisconsin.gov</a> - include names of all students, agency, class name and class date</li> <li>2. You will receive an e-mail acknowledging receipt of your request</li> <li>3. Await a second e-mail confirming your registration.</li> <li>4. Show up for class and sign in there.</li> </ol>
<p>Inacom registration procedures</p> <p>5. If you are from DOA or DWD, For DOA, Org ID: WI-DOA/DET; password: DOADET For DWD, Org ID: WI-DWD; Password: WIDWD</p> <p>If you are not from DOA or DWD call Doug Randall at Inacom 661-7822 to get a OrgID and password.</p> <ol style="list-style-type: none"> <li>6. Go to <a href="http://training.state.wi.us">http://training.state.wi.us</a></li> <li>7. Click IT Curriculum</li> <li>8. Click Log in</li> <li>9. Type your Org ID and password and click "Log In"</li> <li>10. Click Course Catalog</li> <li>11. In the Course Category Box, select PeopleSoft</li> <li>12. Click Search</li> <li>13. Click Register (next to desired course)</li> <li>14. Complete the Individual Details Side (Use your current agency's business address)</li> <li>15. If your agency is paying, go to 16 If the IBIS Project is paying, go to 17.</li> <li>16. If your own employing agency is paying: <ol style="list-style-type: none"> <li>16a. Under Organization Details, under Payment Details, select Credit Card</li> <li>16b. If you know the information, type credit card details: <ul style="list-style-type: none"> <li>--- Name on the Credit Card</li> <li>--- Type of Credit Card</li> <li>--- Credit Card Number</li> <li>--- Credit Card Expiration Date</li> <li>--- Credit Card Security Code</li> </ul> </li> <li>16c. If you do not know this credit card information, select credit card and leave the detail information blank. Then, please ask your agency's credit card holder to contact Inacom and give this information to Inacom. Contact Doug Randall at Inacom - 661-7822.</li> <li>16d. Click the Register button (Important: as with other training registration, you MUST use a p-card. Invoicing is not possible, unless the IBIS Project is paying for training.)</li> </ol> </li> <li>17. If the IBIS Project is paying: <ol style="list-style-type: none"> <li>17a. Under Organization Details, select Invoice.</li> <li>17c. Click the Register button.</li> </ol> </li> </ol>	

Questions, comments, problems? Send an e-mail to: [DOAIBIS@wisconsin.gov](mailto:DOAIBIS@wisconsin.gov)

## Description of Courses:

### Introduction to PeopleSoft for FMS (Financials) and SCM (Supply Chain Management) Rel 8.9 (one day)

The Introduction to PeopleSoft for Financials and SCM course introduces students to concepts used in all PeopleSoft Financial and SCM products. Students learn how to navigate the PeopleSoft menu structure and how to personalize the display of content. Students are introduced to PeopleSoft table structure and the sharing of data across several tables through tableset sharing. Effective dating and row statuses are also covered in this course.

Besides concepts common to most PeopleSoft applications, this course also introduces Financials and SCM specific topics such as ChartField accounting and PS/nVision reporting. The course also covers high-level integration points between financials and SCM products.

Learn To: Navigate the PeopleSoft menu structure; Personalize the display of content; Use effective dating  
Suggested Prerequisites: Basic understanding of relational databases; General knowledge of Windows environment.

#### Course Objectives:

- Describe PeopleSoft integration within Financials and SCM
- Navigate through PeopleSoft Financials and SCM
- Identify the way PeopleSoft stores data
- Explain PeopleSoft reporting tools

#### Course Topics:

- Navigating PeopleSoft Applications
- Understanding System Structure
- Defining Business Units and Set IDs
- Using PeopleSoft Process Scheduler and Reporting Tools
- Utilizing ChartFields

### General Ledger

This course teaches the fundamental concepts and features of the Peoplesoft General Ledger. Participants gain an understanding of how to establish, process, and report on financial transactions. Through real-life examples and hands-on lab activities, participants learn how to establish GL business units, define general options, enter and post journals to a ledger, close year-end books, and create financial reports with PS/nVision. Other topics covered in course include interunit accounting, summary ledgers and chartfield combination editing.

Prerequisite: Introduction to PeopleSoft for FMS and SCM

#### Course Objectives:

- Create and use business units and setids
- Open/close multiple business units and ledgers
- Define chartfields, ledgers, and calendars
- Define new trees using Tree Manager
- Enter and post journal entries to a ledger
- Close interim and year end books
- Create PS/nVision reports